

# User Manual Appointment System



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## System Overview

The Appointment System enables the User to perform the following functions:

- New Patient Registration
- Retrieve User Name
- Retrieve Password
- Schedule Appointment
- Manage Appointment
- Cancel Appointment
- Profile Update
- Feedback

## Menu Options

- Schedule Appointment
- Manage Appointment
- Profile Update
- Feedback

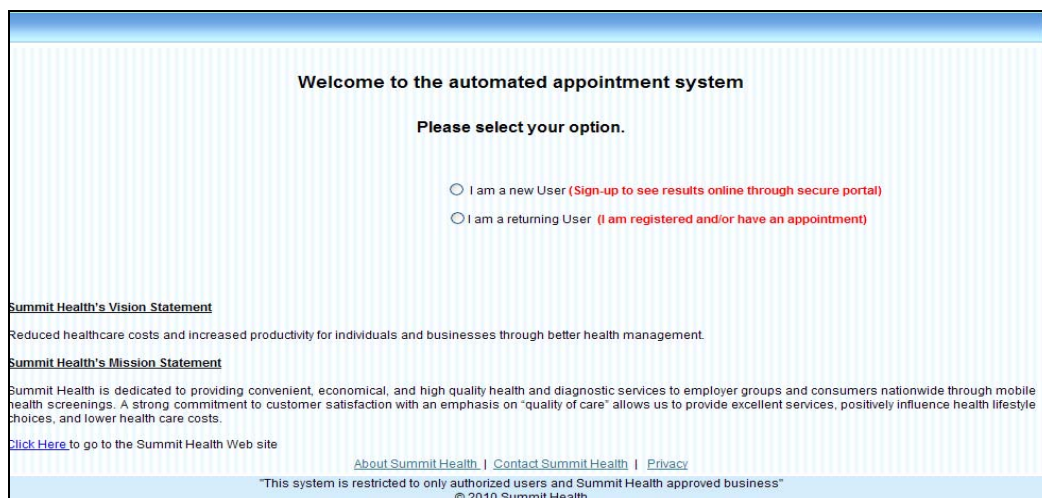
## Application Access

1. Open the browser and enter the URL:

**URL to Application**

2. Press **Enter** or click **Go**

3. The login page of the application appears as in [Figure 1.1](#) Login Screen



The screenshot shows a web browser window with a light blue header and a white background. The main content area is centered and contains the following text:

**Welcome to the automated appointment system**

**Please select your option.**

I am a new User (Sign-up to see results online through secure portal)

I am a returning User (I am registered and/or have an appointment)

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Reduced healthcare costs and increased productivity for individuals and businesses through better health management.

**Summit Health's Mission Statement**  
Summit Health is dedicated to providing convenient, economical, and high quality health and diagnostic services to employer groups and consumers nationwide through mobile health screenings. A strong commitment to customer satisfaction with an emphasis on "quality of care" allows us to provide excellent services, positively influence health lifestyle choices, and lower health care costs.

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Figure 1.1: Login Screen

#### 4. Login

- Click on ***I am a Returning User*** Radio button
- Enter the User Name in the ***User Name*** textbox
- Enter the Password in the ***Password*** textbox
- Click ***SIGN IN***

#### 5. Logout

- Click the ***Sign Out*** link on the top right hand corner of the browser (when logged in)

#### 6. Forgot Password

- Click on the ***Forgot Password*** link
- Screen as in [Figure 1.2](#) ***Forgot Password*** appears
- Click on ***YES*** button if the user is registered with an ***Email ID***
- Click on ***NO*** or ***Don't Know*** button if the user is not registered with an Email ID. [Figure 1.4](#)
- When the user hit on ***YES*** button, this will ask the user to enter the ***User Name*** and ***Email ID***.
- Screen as in [Figure 1.3](#) ***Send Password*** appears.
- Click ***Send Password***.
- A message ***Your Password has been sent to your Email ID.*** is displayed to confirm that the password has been emailed to the user's email id
- Click on ***Cancel*** to go back to login page and login with user name and password



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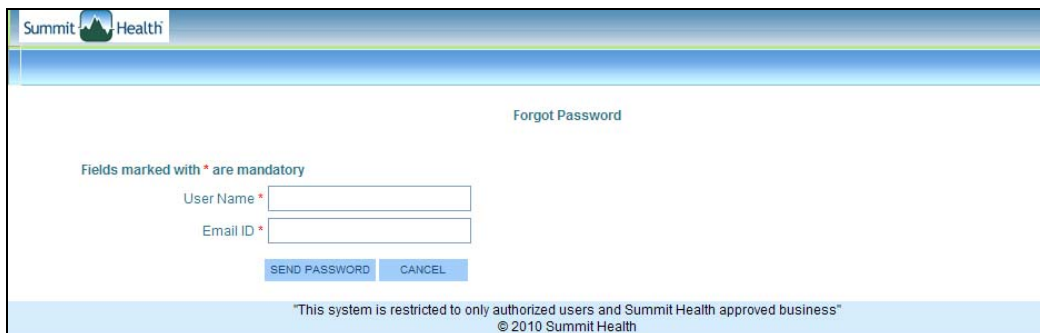
Forgot Password

Fields marked with \* are mandatory  
Have you registered with an Email ID?

YES NO DON'T KNOW

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Figure 1.2 Forgot Password



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Forgot Password

Fields marked with \* are mandatory

User Name \*

Email ID \*

SEND PASSWORD CANCEL

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Figure 1.3 Send Password when user hit ***YES*** button on [Figure 1.2](#)

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Forgot Password

Fields marked with \* are mandatory

First Name \*

Last Name \*

User Name \*

Security question \*

Answer \*

CREATE PASSWORD BACK

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Figure 1.4 Send Password when user hit **NO** or **Don't Know** button on Figure 1.2

- When the user selects the No or Don't Know option in the Forgot Password screen, they will get the option to enter the First Name, Last Name, User Name, Security Question and Answer.
- Click on **Create Password** button. This will create a password and a mail will be sent to the user.
- Click on **Back** button to go back to the login page.

#### 7. Forgot User Name

- Click on **Forgot Username** link
- Screen as in **Figure 1.5 Forgot Username** appears

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Forgot UserName

Fields marked with \* are mandatory  
An email address is highly recommended, Without an email address you will not receive a reminder email

First Name \*

Last Name \*

Middle Initial

Email ID \*

Security question \*

Answer \*

SEND USER NAME CANCEL

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Figure 1.5 Forgot User Name

- Fill in the details like First Name, Last Name, Middle Initial, Email ID, Security Question and Answer. Fill in all the mandatory fields marked with asterisk(\*)
- Click on **Send User Name** button. This will mail the User Name to the user in their mail ID.

## Patient Registration

1. Click ***I am a new User*** radio button on the login screen.
2. This will open the ***Patient Registration - Contact Information*** as shown in [Figure 2.1](#)

Figure 2.1 Patient Registration

3. Fill in the details in the fields marked with asterisk.
4. For the Email Address and Confirm Email Address, patient can't copy and paste the content either way.
5. If the user wishes to register for spouse, then he needs to click on ***Do you want to register your spouse*** check box as shown in [Figure 2.2](#). Feature to get the option for registering for spouse is set in PM level.

Figure 2.2 Spouse Registration

- Click on **Register** button to get registered. This will take the user to **Manage Credential Screen** where the user will give the Security Question and Answer as seen in [Figure 2.3](#)

Figure 2.3 Manage Credentials

- Select the Security Question and answer and click on Update Security Question Information. This will take the user to Schedule Appointment Page.

## Schedule Appointment

- After successful login the user will get the Schedule Appointment page as shown in [Figure 3.1](#)

Figure 3.1 Schedule Appointment

2. The values for Client Name and Program will be grey out and fixed.
3. Select the value for State from **State** dropdown menu.
4. The corresponding value for City and Site will be populated. Select the value of City from **City** dropdown and for Site from **Site** dropdown menu as shown in [Figure 3.2](#)
5. Here **Click to Manage Appointment** button will be disabled as there is no appointment in the name of this user to manage or reschedule.
10. After selecting the **Site** the values for the **Clinics** available will be populated.

Appointment >> Schedule Appointment

Fields marked with \* are mandatory  
Below are the steps to Schedule a Clinic

**Step 1 - Select Site**

- a. Please Select the State.
- b. Please Select the City.
- c. Please Select the Site.

**Step 2 - Select Clinic**

- a. Select the Clinic (Multiple Clinics may be available at each site.)

**Step 3 - Select the action you want to perform**

- a. To Schedule Appointment - Click on "Schedule Appointment" button.
- b. View/Change Appointment - Click on "Manage Appointment" button.
- c. View MAP of Site - Click on "Show Site Map" button.

**Select Site**

Client Name\* Rajesh CLIENT      State\* Michigan

Program\* Immunizations      City\* Southfield

Site\* Rajesh CLIENT-3162 Ground Floor Southfield, MI-48034

**Select the Clinic**

Clinics Available

07/07/2010 9:00AM To 12:00PM       07/17/2010 7:00AM To 9:00AM       06/30/2010 10:00AM To 12:00PM

07/30/2010 10:00AM To 12:00PM

**Action**

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Figure 3.2 Lists of Clinics

8. The list of **Clinic** associated with that particular Site will be populated with the radio button as shown in [Figure 3.2](#). This shows the list of clinics which are going to take place in the future. This does not show the expired clinics.
9. Select the value of Clinic by click on the radio button against the clinic.
10. Click on **Click To Schedule Appointment** button. This will open the Clinic Layout with the Appointments Available and color Legends to indicate **Available**, **Unavailable**, **Waitlist** and **Your Schedule Slot** as shown is [Figure 3.3](#)



Fields marked with \* are mandatory  
 Below are the steps to Schedule a Clinic

**Step 1 - Select Site**  
 a. Please Select the State.  
 b. Please Select the City.  
 c. Please Select the Site.

**Step 2 - Select Clinic**  
 a. Select the Clinic (Multiple Clinics may be available at each site.)

**Step 3 - Select the action you want to perform**  
 a. To Schedule Appointment - Click on " Schedule Appointment " button.  
 b. View/Change Appointment - Click on " Manage Appointment " button.  
 c. View MAP of Site - Click on " Show Site Map " button.

**Select Site**  
 Client Name\*  State\*   
 Program\*  City\*   
 Site\*

**Select the Clinic**  
 Clinics Available  
 07/07/2010 9:00AM To 12:00PM       07/17/2010 7:00AM To 9:00AM       06/30/2010 10:00AM To 12:00PM  
 07/30/2010 10:00AM To 12:00PM

**Appointment**  
 Schedule Appointment Slot For:  Self  
       

To schedule an appointment click on the white area next to Appointment

Legend:  Available     Unavailable     WaitList     Your Scheduled Slot

Appointment Start Time :06/30/10 10:00 AM      Appointment End Time :06/30/10 12:00 AM

Appointment Time Slot	Appointments	
0:00 AM To 10:30 AM	2/3 Appointments Available	Click here to schedule a time slot
0:30 AM To 11:00 AM	3/3 Appointments Available	Click here to schedule a time slot
1:00 AM To 11:30 AM	3/3 Appointments Available	Click here to schedule a time slot
1:30 AM To 12:00 PM	2/3 Appointments Available	Click here to schedule a time slot

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Figure 3.3 Appointments Available

- Click on the space with text as "Click here to schedule a time slot" on the time slot as desired to schedule the appointment.
- This will lead to Appointment Confirmation page with the set of Questions which are set in the Program Management level as shown in Figure 3.4

Appointment    My Profile    Feedback

Appointment >> Appointment Confirmation

Company Name       Employee Name   
 Site       Phone   
 Program Title       Email   
 Clinic Type       Event Date   
 Appointment Start Time

**Consent Forms**  
[View Consent Forms](#)

**How will you come for this appointment (Fasting Status) ?**  
 Fasting  
 Non Fasting  
 Don't know

**Outlook Calendar**  
 Enable Microsoft Outlook meeting notice with Confirmation Mail

**Special Requirement Question :**  
 Are you confined to a wheelchair?       Are you hearing impaired?  
 Are you visually impaired?  
 Does your height exceed 81 inches (6 feet 9 inches)?

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Figure 3.4 Appointment Confirmation

13. Answer the various questions by selecting the radio buttons and checkboxes and click on **Confirm Appointment** button.
14. This will confirm the appointment of the users on the desired slot and show the message as **“Your appointment has been booked. A confirmation email has been sent to your email Address. Your Appointment Date: 07/30/2010, Appointment Start Time: 10:00 AM, Appointment End Time : 10:30 AM”** as shown in Figure 3.5. Here the user will receive the mail from Admin regarding his/her appointment confirmation.

Appointment >> Appointment Confirmation

Company Name: Rajesh CLIENT  
 Site: 010511-3162 Ground Floor, S  
 Program Title: Immunization  
 Clinic Type: Flu shot

Employee Name: Ritwik Kumar  
 Phone:   
 Email: rajesh.s@technosoftcorp.com  
 Event Date: 06/30/2010  
 Appointment Start Time: 10:00 AM

**Consent Forms**  
[View Consent Forms](#)  
**How will you come for this appointment (Fasting Status) ?**  
 Fasting  
 Non Fasting  
 Don't know  
 Do not eat anything except water for atleast 9 hours before having your screening test. You are allowed to take your medicines with water the morning of the test.

**Outlook Calendar**  
 Enable Microsoft Outlook meeting notice with Confirmation Mail

**Special Requirement Question :**  
 Are you confined to a wheelchair?  Are you hearing impaired?  
 Are you visually impaired?  
 Does your height exceed 81 inches (6 feet 9 inches)?

**Your appointment has been booked. A confirmation email has been sent to your email address.  
 Your Appointment Date : 06/30/2010 , Appointment Start Time : 10:00 AM , Appointment End Time : 10:30 AM**

[CONFIRM APPOINTMENT](#) [PRINT](#) [EXIT](#) [CANCEL APPOINTMENT](#)

Figure 3.5 Appointment Confirmation and mail sent

15. When the user clicks on **Cancel Appointment** button, this will take the user back to the Schedule Appointment page.
16. When the user hit on **Print** button, this will print the screen of the appointment scheduled.
17. Click on **Exit** button, this will make the user to logout of the application.

## Manage Appointment

1. Select the **Manage Appointment** tab under **Appointment** menu as shown in [Figure 4.1](#)

The screenshot shows the 'Manage Appointment' interface. At the top, there are navigation tabs: 'Appointment', 'My Profile', and 'Feedback'. Below these are three main sections: 'Schedule Appointment', 'Manage Appointment' (which is highlighted), and 'Feedback'. The 'Manage Appointment' section contains instructions: 'Below are the steps to Schedule a Clinic'. It lists three steps: 'Step 1 - Select Site', 'Step 2 - Select Clinic', and 'Step 3 - Select the action you want to perform'. Below the instructions is a 'Select Site' form with fields for 'Client Name' (Rajesh CLIENT), 'Program' (Immunizations), 'State' (Michigan), 'City' (Southfield), and 'Site'. Below the form is a 'Select the Clinic' section with an 'Action' row containing three buttons: 'CLICK TO SCHEDULE APPOINTMENT', 'CLICK TO MANAGE APPOINTMENT', and 'CLICK TO SHOW SITE MAP'. The footer of the page shows '© 2010 Summit Health'.

Figure 4.1 Manage Appointment

2. Screen as in [Figure 4.2](#) appears displaying the current appointment

The screenshot shows the 'Manage Appointment' interface displaying a table of appointments. The table has the following columns: 'Program Type', 'Program', 'State', 'City', 'Site', 'First Name', 'Last Name', 'Slot Type', 'Confirmed Appointment Time', and 'Wait List Appointment Time'. The table contains one row of data for an immunization appointment. Below the table, there are instructions: 'To cancel your appointment, please click 'Cancel'' and 'To reschedule your existing appointment, please click 'Reschedule''. The footer of the page shows '© 2010 Summit Health'.

Program Type	Program	State	City	Site	First Name	Last Name	Slot Type	Confirmed Appointment Time	Wait List Appointment Time
Immunization	Rajesh Inc. Immunization 03/19/2010 - 05/31/2010	Kentucky	Moorefield	Site for Rajesh Inc.	rajesh	sinha	Self	4/24/2010 9:00:00 AM CANCEL / RESCHEDULE	

Figure 4.2 On selecting Manage Appointment

3. Click on Reschedule button. This is show an alert message **“Do you want to Reschedule this appointment?”** as shown in [Figure 4.3](#)

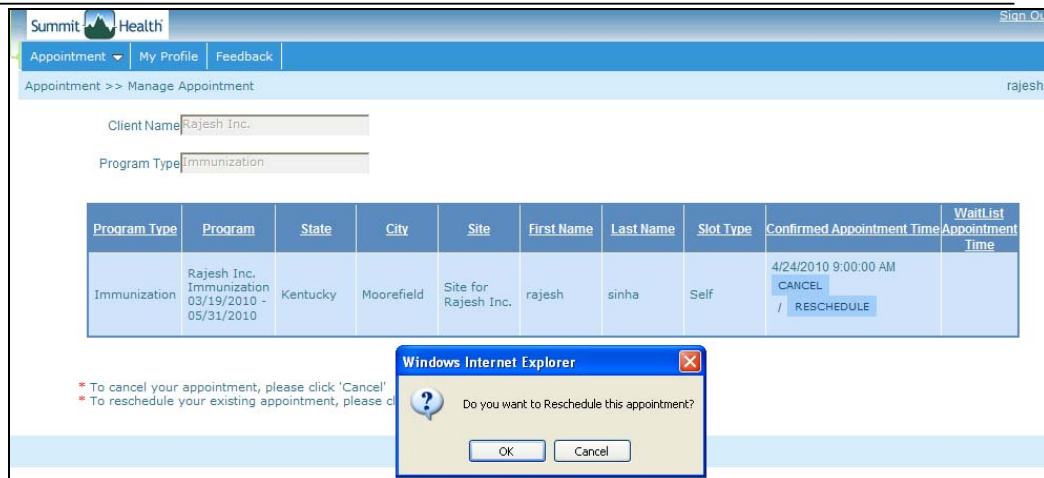


Figure 4.3 Alert Message

4. Click on **Cancel** button to remain on the same page.
5. Click on **OK** button, this will open the Reschedule Appointment page as shown in Figure 4.4. Here the user can **Reschedule** his/her appointment time for the same clinic based on the availability of the slots. The *green strip* shows user's already **Scheduled slot**. This also shows the number of appointments available out of total number of Appointment Available in a particular time slot.

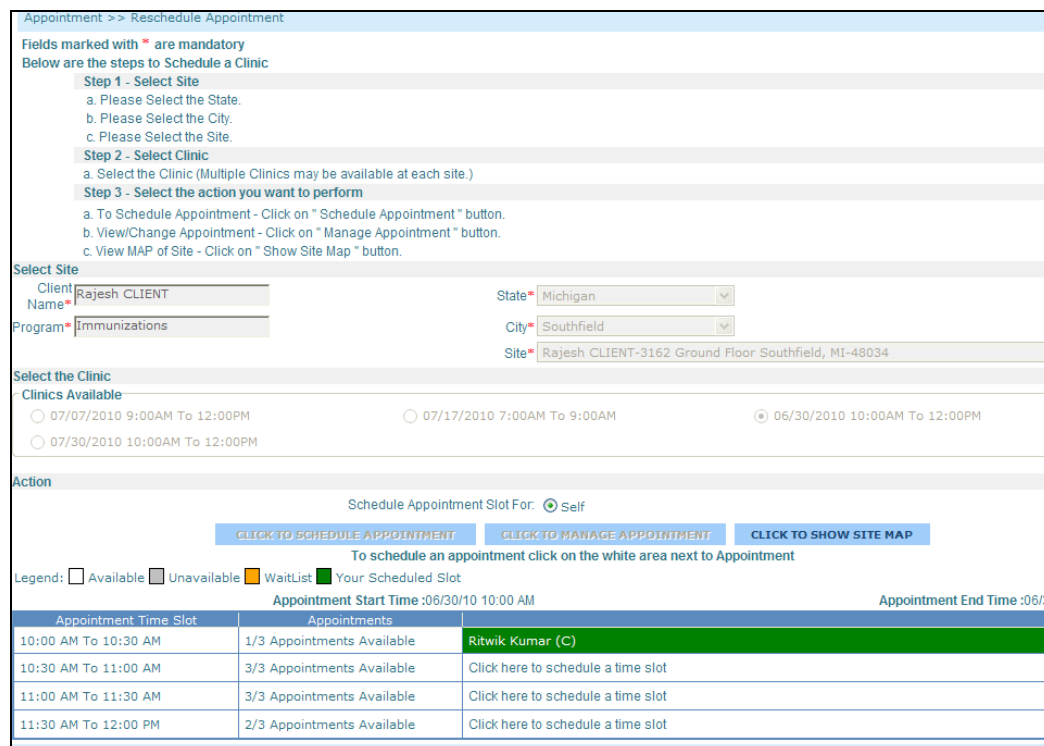


Figure 4.4 Reschedule Appointment

6. Click on the space with text as "Click here to schedule a time slot" on the time slot as desired to schedule the appointment This shows the **Appointment Confirmation** page as shown in Figure 4.5

Figure 4.5 Appointment Confirmation

7. Answer the various questions by selecting the radio buttons and checkboxes and click on **Confirm Appointment** button. This will show the message as **“Your appointment has been booked. A confirmation email has been sent to your email Address. Your Appointment Date: “Date”, Appointment Start Time: “Time”, Appointment End Time : “Time”**”
8. Click on **Cancel Appointment** button. This will navigate back to **Reschedule Appointment** page.
9. Reselect the desired slot, this will again take to Appointment Confirmation page.
10. Select the various questions and click on **Confirm Appointment** button.
11. When the user hit on **Print** button, this will print the screen of the appointment scheduled.
12. Click on **Exit** button, this will make the user to logout of the application.

## Cancel Appointment

1. Select Manage Appointment from Appointment menu. This will show the Manage Appointment page as shown in [Figure 5.1](#)

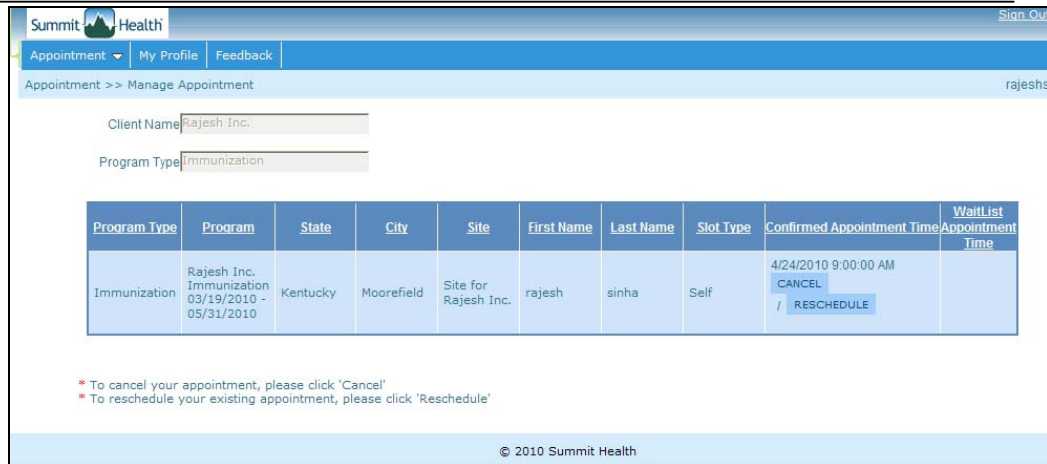


Figure 5.1 On selecting Manage Appointment

- Click on **Cancel** button. This will show the alert message as **“Do you want to cancel this appointment”** with **Ok** and **Cancel** button.
- Click on **Cancel** button to keep the appointment as scheduled.
- Click on **Ok** button.
- This will cancel the appointment with the message as **“The Appointment is Successfully Canceled and email sent to the user.”** As shown in [Figure 5.2](#)

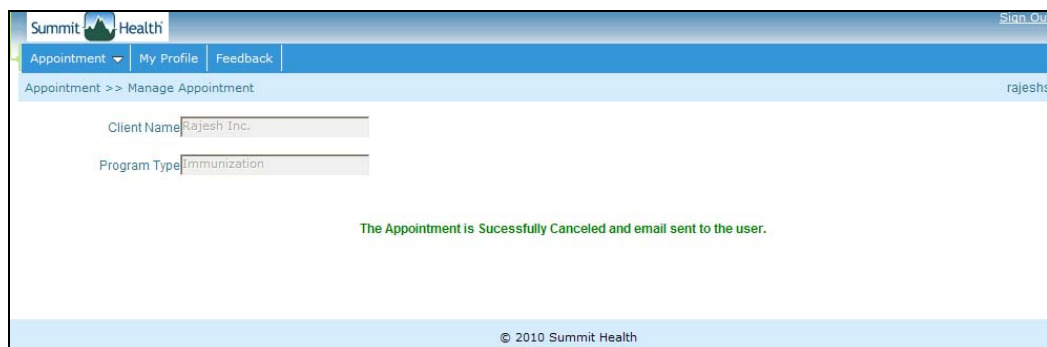


Figure 5.2 Appointment Canceled

## Profile Update

- Click **My Profile** on menu
- This will open the Profile Update page with **Employee Details** and **Employee Password Details** as headers as shown in [Figure 6.1](#)

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Appointment My Profile Feedback

Profile Update rajeshs

Fields marked with \* are mandatory

**Employee Details**

Client Name

User Name

First Name

Last Name

Date Of Birth

Email

Phone

**Employee Password Details**

Old Password

New Password

Confirm Password

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Figure 6.1 Profile Update

4. Edit the details like First Name, Last Name, Date Of Birth, Email ID and Phone.
5. Click on **Update Employee Information** button.
6. This will give the message as **“Updated Successfully.”** and will update the user’s profile.
7. If the user wishes to change his/her password, in the **Employee Password Details**, fill in the values for **Old Password** then **New Password** and **Confirm Password**. Verify that the values are valid and matching else the system will throw the alert message.
8. Click on **Change Password** button.
9. This will show the message as **“Updated Successfully”** and the Password of the user will get changed as shown in [Figure 6.2](#)

Summit Health Sign Out

Appointment My Profile Feedback

Profile Update rajeshs

Fields marked with \* are mandatory

**Employee Details**

Client Name

User Name

First Name

Last Name

Date Of Birth

Email

Phone

**Employee Password Details**

Old Password

New Password

Confirm Password

**Updated Successfully**

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Figure 6.2 Change Password

## Feedback

1. Click on **Feedback** tab on the header.
2. This will open the Feedback page as shown in [Figure 7.1](#)

Summit Health Sign Out

Appointment My Profile Feedback

Feedback rajeshs

Clinic

Type

Enter your feedback here

Please select here if you would like a reply. (Note: Your Name, Phone Number and Email will be seen by the Recipient)

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Figure 7.1 Feedback

3. Select the option for Clinic from **Clinic** dropdown menu.
4. Select either **Question** or **Feedback** from **Type** dropdown menu.
5. Fill in the comments in the **"Enter your feedback here"** section.
6. Check in the **"Please select here if you would like a reply"** if the user want the reply to the feedback.



7. Click on **Send Feedback** button.
8. This will send the feedback of the clinic to the Site Coordinator with the confirmation message as “**Your valuable feedback has been successfully sent.**” As shown in [Figure 7.2](#)

The screenshot displays a web interface for providing feedback. At the top, there are navigation tabs: "Appointment", "My Profile", and "Feedback". The "Feedback" tab is active. Below the tabs, the word "Feedback" is displayed. There are two dropdown menus: "Clinic" with the value "E0010511, 3162 Ground Floor, Southfield, Michigan, 48034" and "Type" with the value "Question". Below these is a text area with the prompt "Enter your feedback here" and the text "This is for User Manual, User Prospective". At the bottom of the form, there is a checkbox labeled "Please select here if you would like a reply. (Note:Your Name, Phone Number and Email will be seen by the Recipient)". Below the checkbox, a green confirmation message reads "Your valuable feedback has been successfully Sent." A blue button labeled "SEND FEEDBACK" is positioned below the message. The footer of the page contains the copyright notice "© 2010 Summit Health".

Figure 7.2 Feedback Sent